

Tax Elections- Federal, State & Local Withholding Elections

USER GUIDE

TAX ELECTIONS

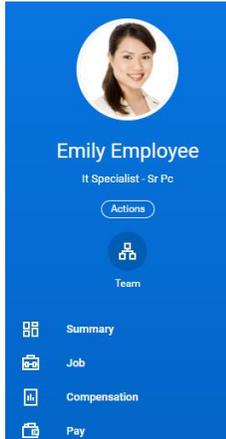
Federal, State and Local Withholding Elections

The Federal Government updated the W-4 Form in 2020. For general instructions, visit the IRS website at:

<https://www.irs.gov/pub/irs-pdf/fw4.pdf>

1. From your home page, click on your profile icon  in the upper right of Workday and click **View Profile**.

2. Choose **Pay** tab on the left.



3. From the top banner, select **Tax Elections**.

Tax Elections Payment Elections

4. On this screen you have the option of **Federal & State and Local Withholding**. To make a change to either one, click **Update**.

5. You will get a pop up to confirm the **effective date** of the change. Click **OK**.

6. Any fields with the red asterisk (*) are required.

7. You can click **View Blank Form** to see the paper W-4 form (Federal) or WT-4 (WI) form. It will take a couple of seconds to download. This will show you the first page of the forms. For general instructions, visit the IRS website at: <https://www.irs.gov/pub/irs-pdf/fw4.pdf>

8. **All previous elections will show**. Your most recent change (on the top) is the one that will be active for payroll.

9. Select your **Marital Status**.

10. Enter in the information for Multiple Jobs or Spouse Works, Claim Dependents- if applicable. This does not apply to WI: WT-4.

11. Step 4- Other Adjustments- please read each section and if you choose any option, fill in the boxes.

12. Select Exempt or Nonresident alien, if applicable.

13. Then checkmark the box **I Agree** below to electronically sign the document. Click **OK**.



Note: The last submitted tax withholding elections will take effect for payroll. If this change is done during payroll processing, it may not be updated until the next pay period. All previous elections will show.